

Sucralose Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Sucralose, a high-intensity non-caloric sweetener approximately 650 times sweeter than sucrose, represents the fifth generation of artificial sweeteners. Discovered in 1976, sucralose is widely used in food and beverage products, pharmaceuticals, and cosmetics due to its stability under heat, resistance to pH changes, and favorable safety profile. The raw materials primarily include refined sugar and DMF. The global sucralose market is characterized by high concentration, significant cost competitiveness from China-based producers, and continuous capacity expansions.

In 2025, the global sucralose market is projected to reach 600–700 million USD, supported by steady growth in reduced-sugar food and beverages, rising health awareness globally, and the increasing shift toward low-calorie sweeteners in both developing and mature markets. Between 2025 and 2030, the industry is expected to expand at a CAGR of 7%–9%.

Regionally, Asia Pacific is expected to achieve growth of 7.5%–9.5%, primarily driven by China's dominant production base and increasing consumption across beverages, dairy, and processed foods. North America is projected to grow at 6%–8%, supported by strong demand from soft drink manufacturers, sports nutrition, and sugar-reduction initiatives. Europe is expected to grow at 6%–8%, driven by regulatory support for sugar reduction and increased use of artificial sweeteners in functional food categories. Latin America is projected to grow at 6.5%–8.5%, supported by growing consumption of beverages and bakery products. Middle East & Africa is expected to grow at 5.5%–7.5%, driven by expanding processed food consumption and beverage demand.

By application, Food & Beverage represents the largest segment, expected to grow at

7%–9%, supported by rising demand for low-calorie beverages, sugar-free confectionery, bakery products, and dairy alternatives. Pharmaceutical applications are projected to grow at 6%–8%, as sucralose is used in syrups, chewable tablets, and oral formulations where taste masking is required. Cosmetics are expected to grow at 5%–7%, as sucralose is increasingly utilized in personal care formulations for flavor enhancement.

Industrial concentration is high, with the top producers accounting for more than 80% of global output. Key producers include Tate & Lyle, JK Sucralose, Anhui Jinhe Industrial, Techno Food Ingredients, Newtrend Group, San Fu Chemical, and Shandong Kangbao Biochemical Technology. Tate & Lyle generated 246.6M USD in sucralose revenue in 2024 and remains a key supplier in premium-grade markets. Chinese producers have expanded capacity aggressively: Anhui Jinhe reached 8,000 t/y, Shandong Kangbao reached 8,000 t/y and plans expansion to 16,000 t/y, Techno Food Ingredients operates 4,000 t/y and plans 6,000 t/y, and JK Sucralose expanded from 1,000 t/y to 4,000 t/y, with long-term plans for 12,000 t/y including its Thailand facility with 500 t/y designed capacity.

The value chain includes refined sugar and DMF supply, chlorination processes, crystallization, purification, and downstream blending and formulation. China holds cost advantages in raw materials, technology standardization, and large-scale operations. The global market faces challenges from overcapacity following aggressive expansions in 2022–2024, although prices stabilized in 2025 at 180,000–200,000 RMB/t after the end of price wars.

Opportunities arise from global sugar-reduction trends, growth in functional beverages, and increased adoption of non-caloric sweeteners in pharmaceuticals and personal care. Challenges include feedstock cost volatility, environmental compliance requirements for chlorinated chemical processes, and global trade uncertainties. The Trump Administration tariff policy poses potential risks for cross-border sweetener trade, especially in North America, while global supply chain restructuring may lead to regional diversification of production and strategic inventory adjustments by multinational beverage and food manufacturers.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

- 3.1 Research Scope
- 3.2 Research Sources
 - 3.2.1 Data Sources
 - 3.2.2 Assumptions
- 3.3 Research Method

CHAPTER 4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

- 6.1 Upstream/Suppliers Analysis
- 6.2 Sucralose Analysis
 - 6.2.1 Technology Analysis
 - 6.2.2 Cost Analysis
 - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 TRADING ANALYSIS

- 8.1 Export of Sucralose by Region
- 8.2 Import of Sucralose by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST SUCRALOSE MARKET IN NORTH AMERICA (2020-2030)

- 9.1 Sucralose Market Size
- 9.2 Sucralose Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
 - 9.5.1 United States
 - 9.5.2 Canada
 - 9.5.3 Mexico

CHAPTER 10 HISTORICAL AND FORECAST SUCRALOSE MARKET IN SOUTH AMERICA (2020-2030)

- 10.1 Sucralose Market Size
- 10.2 Sucralose Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
 - 10.5.1 Brazil
 - 10.5.2 Argentina
 - 10.5.3 Chile
 - 10.5.4 Peru

CHAPTER 11 HISTORICAL AND FORECAST SUCRALOSE MARKET IN ASIA & PACIFIC (2020-2030)

- 11.1 Sucralose Market Size
- 11.2 Sucralose Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
 - 11.5.1 China
 - 11.5.2 India
 - 11.5.3 Japan
 - 11.5.4 South Korea
 - 11.5.5 Southeast Asia
 - 11.5.6 Australia

CHAPTER 12 HISTORICAL AND FORECAST SUCRALOSE MARKET IN EUROPE (2020-2030)

- 12.1 Sucralose Market Size
- 12.2 Sucralose Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
 - 12.5.1 Germany
 - 12.5.2 France
 - 12.5.3 United Kingdom
 - 12.5.4 Italy
 - 12.5.5 Spain
 - 12.5.6 Belgium
 - 12.5.7 Netherlands
 - 12.5.8 Austria
 - 12.5.9 Poland
 - 12.5.10 Russia

CHAPTER 13 HISTORICAL AND FORECAST SUCRALOSE MARKET IN MEA (2020-2030)

- 13.1 Sucralose Market Size
- 13.2 Sucralose Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

CHAPTER 14 SUMMARY FOR GLOBAL SUCRALOSE MARKET (2020-2025)

- 14.1 Sucralose Market Size
- 14.2 Sucralose Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

CHAPTER 15 GLOBAL SUCRALOSE MARKET FORECAST (2025-2030)

- 15.1 Sucralose Market Size Forecast
- 15.2 Sucralose Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 Tate & Lyle
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Sucralose Information
 - 16.1.3 SWOT Analysis of Tate & Lyle
 - 16.1.4 Tate & Lyle Sucralose Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.2 JK Sucralose
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Sucralose Information
 - 16.2.3 SWOT Analysis of JK Sucralose
 - 16.2.4 JK Sucralose Sucralose Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.3 Anhui Jinhe Industrial
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Sucralose Information
 - 16.3.3 SWOT Analysis of Anhui Jinhe Industrial
 - 16.3.4 Anhui Jinhe Industrial Sucralose Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.4 Techno Food Ingredients

16.4.1 Company Profile

16.4.2 Main Business and Sucralose Information

16.4.3 SWOT Analysis of Techno Food Ingredients

16.4.4 Techno Food Ingredients Sucralose Sales, Revenue, Price and Gross Margin
(2020-2025)

16.5 Newtrend Group

16.5.1 Company Profile

16.5.2 Main Business and Sucralose Information

16.5.3 SWOT Analysis of Newtrend Group

16.5.4 Newtrend Group Sucralose Sales, Revenue, Price and Gross Margin
(2020-2025)

Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

Table Abbreviation and Acronyms List
Table Research Scope of Sucralose Report
Table Data Sources of Sucralose Report
Table Major Assumptions of Sucralose Report
Figure Market Size Estimated Method
Figure Major Forecasting Factors
Figure Sucralose Picture
Table Sucralose Classification
Table Sucralose Applications List
Table Drivers of Sucralose Market
Table Restraints of Sucralose Market
Table Opportunities of Sucralose Market
Table Threats of Sucralose Market
Table COVID-19 Impact for Sucralose Market
Table Raw Materials Suppliers List
Table Different Production Methods of Sucralose
Table Cost Structure Analysis of Sucralose
Table Key End Users List
Table Latest News of Sucralose Market
Table Merger and Acquisition List
Table Planned/Future Project of Sucralose Market
Table Policy of Sucralose Market
Table 2020-2030 Regional Export of Sucralose
Table 2020-2030 Regional Import of Sucralose
Table 2020-2030 Regional Trade Balance
Figure 2020-2030 Regional Trade Balance
Table 2020-2030 North America Sucralose Market Size and Market Volume List
Figure 2020-2030 North America Sucralose Market Size and CAGR
Figure 2020-2030 North America Sucralose Market Volume and CAGR
Table 2020-2030 North America Sucralose Demand List by Application
Table 2020-2025 North America Sucralose Key Players Sales List
Table 2020-2025 North America Sucralose Key Players Market Share List
Table 2020-2030 North America Sucralose Demand List by Type
Table 2020-2025 North America Sucralose Price List by Type
Table 2020-2030 United States Sucralose Market Size and Market Volume List

Table 2020-2030 United States Sucralose Import & Export List
Table 2020-2030 Canada Sucralose Market Size and Market Volume List
Table 2020-2030 Canada Sucralose Import & Export List
Table 2020-2030 Mexico Sucralose Market Size and Market Volume List
Table 2020-2030 Mexico Sucralose Import & Export List
Table 2020-2030 South America Sucralose Market Size and Market Volume List
Figure 2020-2030 South America Sucralose Market Size and CAGR
Figure 2020-2030 South America Sucralose Market Volume and CAGR
Table 2020-2030 South America Sucralose Demand List by Application
Table 2020-2025 South America Sucralose Key Players Sales List
Table 2020-2025 South America Sucralose Key Players Market Share List
Table 2020-2030 South America Sucralose Demand List by Type
Table 2020-2025 South America Sucralose Price List by Type
Table 2020-2030 Brazil Sucralose Market Size and Market Volume List
Table 2020-2030 Brazil Sucralose Import & Export List
Table 2020-2030 Argentina Sucralose Market Size and Market Volume List
Table 2020-2030 Argentina Sucralose Import & Export List
Table 2020-2030 Chile Sucralose Market Size and Market Volume List
Table 2020-2030 Chile Sucralose Import & Export List
Table 2020-2030 Peru Sucralose Market Size and Market Volume List
Table 2020-2030 Peru Sucralose Import & Export List
Table 2020-2030 Asia & Pacific Sucralose Market Size and Market Volume List
Figure 2020-2030 Asia & Pacific Sucralose Market Size and CAGR
Figure 2020-2030 Asia & Pacific Sucralose Market Volume and CAGR
Table 2020-2030 Asia & Pacific Sucralose Demand List by Application
Table 2020-2025 Asia & Pacific Sucralose Key Players Sales List
Table 2020-2025 Asia & Pacific Sucralose Key Players Market Share List
Table 2020-2030 Asia & Pacific Sucralose Demand List by Type
Table 2020-2025 Asia & Pacific Sucralose Price List by Type
Table 2020-2030 China Sucralose Market Size and Market Volume List
Table 2020-2030 China Sucralose Import & Export List
Table 2020-2030 India Sucralose Market Size and Market Volume List
Table 2020-2030 India Sucralose Import & Export List
Table 2020-2030 Japan Sucralose Market Size and Market Volume List
Table 2020-2030 Japan Sucralose Import & Export List
Table 2020-2030 South Korea Sucralose Market Size and Market Volume List
Table 2020-2030 South Korea Sucralose Import & Export List
Table 2020-2030 Southeast Asia Sucralose Market Size List
Table 2020-2030 Southeast Asia Sucralose Market Volume List

Table 2020-2030 Southeast Asia Sucralose Import List
Table 2020-2030 Southeast Asia Sucralose Export List
Table 2020-2030 Australia Sucralose Market Size and Market Volume List
Table 2020-2030 Australia Sucralose Import & Export List
Table 2020-2030 Europe Sucralose Market Size and Market Volume List
Figure 2020-2030 Europe Sucralose Market Size and CAGR
Figure 2020-2030 Europe Sucralose Market Volume and CAGR
Table 2020-2030 Europe Sucralose Demand List by Application
Table 2020-2025 Europe Sucralose Key Players Sales List
Table 2020-2025 Europe Sucralose Key Players Market Share List
Table 2020-2030 Europe Sucralose Demand List by Type
Table 2020-2025 Europe Sucralose Price List by Type
Table 2020-2030 Germany Sucralose Market Size and Market Volume List
Table 2020-2030 Germany Sucralose Import & Export List
Table 2020-2030 France Sucralose Market Size and Market Volume List
Table 2020-2030 France Sucralose Import & Export List
Table 2020-2030 United Kingdom Sucralose Market Size and Market Volume List
Table 2020-2030 United Kingdom Sucralose Import & Export List
Table 2020-2030 Italy Sucralose Market Size and Market Volume List
Table 2020-2030 Italy Sucralose Import & Export List
Table 2020-2030 Spain Sucralose Market Size and Market Volume List
Table 2020-2030 Spain Sucralose Import & Export List
Table 2020-2030 Belgium Sucralose Market Size and Market Volume List
Table 2020-2030 Belgium Sucralose Import & Export List
Table 2020-2030 Netherlands Sucralose Market Size and Market Volume List
Table 2020-2030 Netherlands Sucralose Import & Export List
Table 2020-2030 Austria Sucralose Market Size and Market Volume List
Table 2020-2030 Austria Sucralose Import & Export List
Table 2020-2030 Poland Sucralose Market Size and Market Volume List
Table 2020-2030 Poland Sucralose Import & Export List
Table 2020-2030 Russia Sucralose Market Size and Market Volume List
Table 2020-2030 Russia Sucralose Import & Export List
Table 2020-2030 MEA Sucralose Market Size and Market Volume List
Figure 2020-2030 MEA Sucralose Market Size and CAGR
Figure 2020-2030 MEA Sucralose Market Volume and CAGR
Table 2020-2030 MEA Sucralose Demand List by Application
Table 2020-2025 MEA Sucralose Key Players Sales List
Table 2020-2025 MEA Sucralose Key Players Market Share List
Table 2020-2030 MEA Sucralose Demand List by Type

Table 2020-2025 MEA Sucralose Price List by Type
Table 2020-2030 Egypt Sucralose Market Size and Market Volume List
Table 2020-2030 Egypt Sucralose Import & Export List
Table 2020-2030 Israel Sucralose Market Size and Market Volume List
Table 2020-2030 Israel Sucralose Import & Export List
Table 2020-2030 South Africa Sucralose Market Size and Market Volume List
Table 2020-2030 South Africa Sucralose Import & Export List
Table 2020-2030 Gulf Cooperation Council Countries Sucralose Market Size and Market Volume List
Table 2020-2030 Gulf Cooperation Council Countries Sucralose Import & Export List
Table 2020-2030 Turkey Sucralose Market Size and Market Volume List
Table 2020-2030 Turkey Sucralose Import & Export List
Table 2020-2025 Global Sucralose Market Size List by Region
Table 2020-2025 Global Sucralose Market Size Share List by Region
Table 2020-2025 Global Sucralose Market Volume List by Region
Table 2020-2025 Global Sucralose Market Volume Share List by Region
Table 2020-2025 Global Sucralose Demand List by Application
Table 2020-2025 Global Sucralose Demand Market Share List by Application
Table 2020-2025 Global Sucralose Key Vendors Sales List
Table 2020-2025 Global Sucralose Key Vendors Sales Share List
Figure 2020-2025 Global Sucralose Market Volume and Growth Rate
Table 2020-2025 Global Sucralose Key Vendors Revenue List
Figure 2020-2025 Global Sucralose Market Size and Growth Rate
Table 2020-2025 Global Sucralose Key Vendors Revenue Share List
Table 2020-2025 Global Sucralose Demand List by Type
Table 2020-2025 Global Sucralose Demand Market Share List by Type
Table 2020-2025 Regional Sucralose Price List
Table 2025-2030 Global Sucralose Market Size List by Region
Table 2025-2030 Global Sucralose Market Size Share List by Region
Table 2025-2030 Global Sucralose Market Volume List by Region
Table 2025-2030 Global Sucralose Market Volume Share List by Region
Table 2025-2030 Global Sucralose Demand List by Application
Table 2025-2030 Global Sucralose Demand Market Share List by Application
Table 2025-2030 Global Sucralose Key Vendors Sales List
Table 2025-2030 Global Sucralose Key Vendors Sales Share List
Figure 2025-2030 Global Sucralose Market Volume and Growth Rate
Table 2025-2030 Global Sucralose Key Vendors Revenue List
Figure 2025-2030 Global Sucralose Market Size and Growth Rate
Table 2025-2030 Global Sucralose Key Vendors Revenue Share List

Table 2025-2030 Global Sucralose Demand List by Type
Table 2025-2030 Global Sucralose Demand Market Share List by Type
Table 2025-2030 Sucralose Regional Price List
Table Tate & Lyle Information
Table SWOT Analysis of Tate & Lyle
Table 2020-2025 Tate & Lyle Sucralose Sale Volume Price Cost Revenue
Figure 2020-2025 Tate & Lyle Sucralose Sale Volume and Growth Rate
Figure 2020-2025 Tate & Lyle Sucralose Market Share
Table JK Sucralose Information
Table SWOT Analysis of JK Sucralose
Table 2020-2025 JK Sucralose Sucralose Sale Volume Price Cost Revenue
Figure 2020-2025 JK Sucralose Sucralose Sale Volume and Growth Rate
Figure 2020-2025 JK Sucralose Sucralose Market Share
Table Anhui Jinhe Industrial Information
Table SWOT Analysis of Anhui Jinhe Industrial
Table 2020-2025 Anhui Jinhe Industrial Sucralose Sale Volume Price Cost Revenue
Figure 2020-2025 Anhui Jinhe Industrial Sucralose Sale Volume and Growth Rate
Figure 2020-2025 Anhui Jinhe Industrial Sucralose Market Share
Table Techno Food Ingredients Information
Table SWOT Analysis of Techno Food Ingredients
Table 2020-2025 Techno Food Ingredients Sucralose Sale Volume Price Cost Revenue
Figure 2020-2025 Techno Food Ingredients Sucralose Sale Volume and Growth Rate
Figure 2020-2025 Techno Food Ingredients Sucralose Market Share
Table Newtrend Group Information
Table SWOT Analysis of Newtrend Group
Table 2020-2025 Newtrend Group Sucralose Sale Volume Price Cost Revenue
Figure 2020-2025 Newtrend Group Sucralose Sale Volume and Growth Rate
Figure 2020-2025 Newtrend Group Sucralose Market Share

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